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# Policy Brief

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# Understanding Consumer Willingness to Pay for Sustainable Attributes of Dried Fruits and Nuts in Central Asia

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## Key message

Consumers in Central Asia value food safety, social responsibility, and environmental sustainability when purchasing dried fruits and nuts and are willing to pay more for products that provide these attributes. Food safety generally receives the highest valuation, although preferences differ across countries and consumer groups. These findings indicate opportunities for producers and food-processing SMEs to differentiate their products through credible quality and sustainability attributes, while considering consumers' price sensitivity and affordability.

## What is the issue?

Despite Central Asia's importance as a producer of dried fruits and nuts, adoption of food safety, environmental, and social standards remains limited. Meeting such standards can require additional investments by producers and food-processing SMEs, making it important to understand whether consumers value these attributes and are willing to pay for them. While international markets increasingly demand certified and traceable products, evidence on domestic consumer demand for food safety, environmental sustainability, and social responsibility remains limited. Better information on consumer preferences and willingness to pay can help producers, SMEs, and policymakers identify which attributes should be prioritized and where investments in product upgrading are most likely to respond to consumer demand.

## Research approach

The study surveyed 2,500 urban and rural consumers across Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan. Respondents were presented with hypothetical purchasing choices to estimate how much they value different product attributes, including food safety, environmental sustainability, social responsibility, region of production, and price. Statistical analysis was used to estimate consumers' willingness to pay (WTP) for these attributes and to examine how preferences vary by gender, age, education, income, and location. As the estimates are based on hypothetical choices rather than actual purchases, stated willingness to pay may differ from consumers' real purchasing behavior, particularly where household budgets constrain the ability to pay higher prices.

## Key findings

**High Demand for Quality and Ethics:** Consumers generally place the highest value on food safety, followed by social responsibility and environmental sustainability. This suggests that investments in food safety should receive particular attention when producers and SMEs prioritize product upgrading.

**Preferences differ across countries and consumer groups**:

- Kazakhstan and Kyrgyzstan: Women show stronger preferences for food safety attributes.
- Uzbekistan: Women place greater value on environmentally responsible products, while younger consumers show stronger preferences for local origin.
- Kyrgyzstan: Younger consumers place greater value on food safety.

- Kyrgyzstan and Uzbekistan: Rural consumers are more price-sensitive, highlighting the importance of affordability when introducing products with sustainability or certification premiums.
- Tajikistan: More highly educated consumers show stronger preferences for food safety and sustainability attributes.
- Uzbekistan and Tajikistan: Higher-income consumers show stronger preferences for local origin.

## Policy Recommendations

- Prioritize food safety while adapting strategies to national preferences: Give food safety a central role in product upgrading and quality-assurance initiatives, while adapting additional attributes to country-specific consumer preferences. Environmental and social attributes should be promoted where consumer demand supports them rather than through a uniform regional approach.
- Develop credible and understandable product information: Strengthen labeling and traceability systems that allow consumers to identify food-safety, environmental, social, and origin attributes. Where new labeling initiatives are considered, build on existing institutional structures where possible to limit administrative and compliance costs.
- Balance product upgrading with affordability: Avoid assuming that stated willingness to pay translates directly into the ability to pay higher prices. Rural consumers in Kyrgyzstan and Uzbekistan were particularly price-sensitive; therefore, certification and sustainability strategies should consider affordable product options alongside premium products.
- Reduce the compliance burden for SMEs and producers: Provide targeted technical assistance, training, and shared services that help SMEs and producer groups meet food-safety, traceability, and sustainability requirements without bearing the full cost individually. More resource-intensive certification support should be targeted where expected market benefits justify the additional costs.
- Use consumer information to guide market development: Producers and SMEs should use country- and consumer-specific preferences when deciding which attributes to emphasize. Investments in certification, sustainability, or origin-based differentiation should be assessed against expected consumer demand and the costs of achieving and maintaining these attributes.
- Use sustainability attributes strategically in export promotion: Food safety, sustainability, traceability, and origin can support national branding and export-promotion strategies, but the WTP evidence in this study reflects consumers within Central Asia. Export strategies should therefore also be informed by evidence on preferences and requirements in the specific destination markets.

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